PRACTICE BOOMERS

Onboarding Process for a New Institutional PB Account

This sequence of events outlines the steps to be taken when onboarding a new PB account that will include a Mastermind coaching engagement.

1. Firm commits to a launch (e.g. We want to get started in June)
2. PB sends firm licensing agreement and invoice for first payment
3. PB selects facilitator
4. PB sends “Practice Boomers Guidebook” to CMO
5. PB sends facilitator bio to firm
6. PB/Firm schedule kick-off
7. Firm sends PB bios of participants
8. PB forwards bios to facilitator
9. PB negotiates MM dates between facilitator and firm
10. Facilitator presents kickoff and collects briefcase/tracker data
11. Firm sends any outstanding briefcase/tracker data to PB
12. PB forwards MM dates to DA calendar
13. PB forwards briefcase/tracker data to facilitator
14. PB creates accounts for participants and CMO and enters their briefcase/tracker data. (Note that these are "institutional" s2 level accounts.)
15. PB creates MM Summary Report with password
16. PB creates MM recordings page for the firm on PB with password
17. Facilitator sends "Welcome email" to firm with login/MM recording password to be distributed to participants
18. Facilitator makes "welcome calls" to each participant
19. First MM call